



Procurement

SUPPLIER RELATIONSHIP MANAGEMENT



Uploading a document to the Proactis Supplier Network

Introduction:

This guide covers how to upload a document to your supplier network.

-How to upload insurance documents

-How to upload bank details

Instructions:

1. Click on your profile on the top right





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2. Click on 'Your Business'

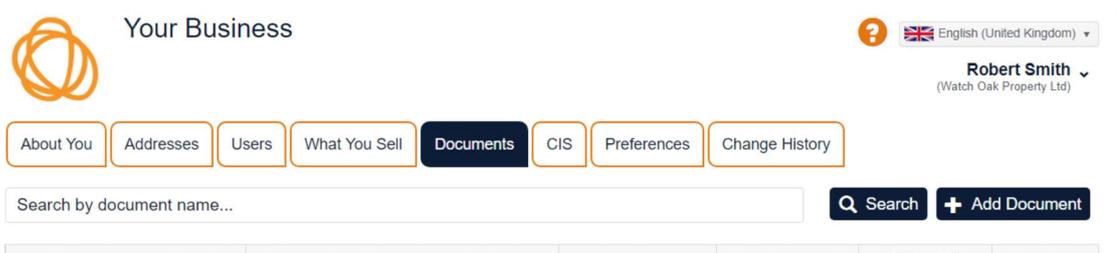
The screenshot shows the 'Supplier Network' dashboard. At the top left is the Southern Housing logo and the text 'Supplier Network'. On the right, there is a 'Help' button with a question mark icon, a language dropdown set to 'English (United Kingdom)', and a user profile for 'Robert Smith (Watch Oak Property Ltd)'. The profile dropdown menu is open, showing options: 'Hi, Robert!', 'Your Business' (highlighted in yellow), 'Your Transactions', 'Help', 'Manage Preferences', 'Change Password', and 'Sign out'. The dashboard features several colored cards with icons and counts: 'Notifications' (0), 'Opportunities' (103), 'Orders' (0), 'Invoices & Credits' (0), 'Customer Relationships' (0), 'Customer Requests' (0), 'Auctions' (0), and 'Contracts' (3).

3. Select the 'Documents' tab

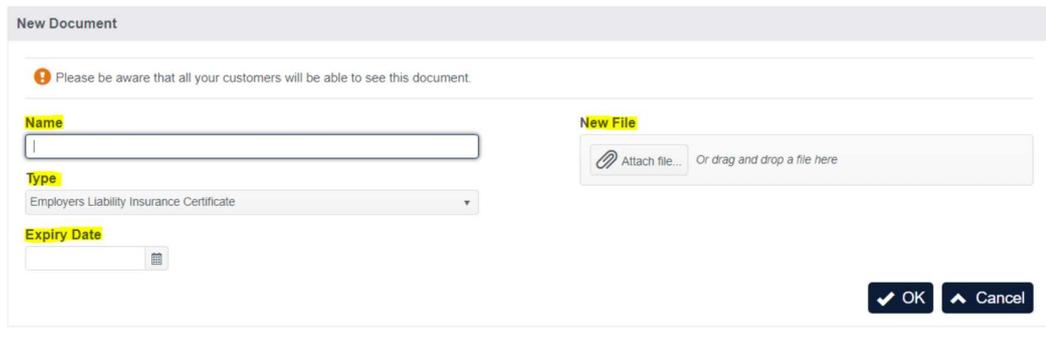
The screenshot shows the 'Your Business' page with the 'Documents' tab selected. At the top left is the Southern Housing logo and the text 'Your Business'. On the right, there is a language dropdown set to 'English (United Kingdom)' and a user profile for 'Robert Smith (Watch Oak Property Ltd)'. Below the header is a navigation bar with tabs: 'About You', 'Addresses', 'Users', 'What You Sell', 'Documents' (selected and highlighted in dark blue), 'CIS', 'Preferences', and 'Change History'. Below the navigation bar is a search bar with the placeholder text 'Search by document name...'. To the right of the search bar are two buttons: 'Search' and '+ Add Document'. Below the search bar is a table with the following columns: 'Name', 'Type', 'Last Changed', 'Expires In', 'Visible to all Customers', and 'Show Me'.



4. Click on the 'Add Document' button on the right-hand side



5. Complete the required fields and click 'Attach File' to upload your document. You may also drag and drop a file directly into the upload area.



To ensure compliance **each insurance document uploaded must have the correct document type selected** from the dropdown menu in the portal.



There must be a **separate entry for each required type of insurance**, with the corresponding document type selected as follows:



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Insurance Type	Required Document Type Selection
Employers' Liability	Employers Liability
Public Liability	Public Liability
Professional Indemnity	Professional Indemnity

✓ **Example:** If you are uploading an Employers' Liability certificate, you must select 'Employers Liability' as the document type.



Please note: Bank Details must be uploaded on a company headed PDF. 'Generic Document' should be selected as the document type.

⚠ **Important:** Uploading multiple insurance documents under a single document type **won't** reactivate your account.

6. Click 'OK' to complete the upload. Ensure that the 'Visible to all customers' box is checked. Once uploaded correctly, your account will be reinstated within approximately 15 minutes and available for new orders.

New Document

ⓘ Please be aware that all your customers will be able to see this document.

Name

Type

Expiry Date

New File

***If there are any issues with uploading documents, please contact Procurement@southernhousing.org.uk.**